

Mergers & Acquisitions Case Study

How to build a unified org structure



Project scope

Managing the merger of two companies is a complex project. Integrating the culture, processes and people of the organisations involved raises a lot of issues and requires robust planning and processes.

This is where visualising the structures of both organisations becomes important. It provides a complete view of the positions, responsibilities, and reporting lines making it easier for decision-makers to create informed strategies and anticipate roadblocks.

This case study explores how Navigo's org design platform, org.manager, helped visualise the merger of two companies with different data models and created a single hierarchical view of the newly created entity.

Data overview

The project required integrating two different payroll systems. This had its own set of complexities:

- Managing two separate data feeds with different identity providers (IDPs)
- Adding the results of scenario modelling to keep the org chart up-to-date (details below)

To address these data complexities, a dummy record was created which connected the continually updated CSV data files to create three structures:

- First structure - Existing Company A
- Second structure - Existing Company B
- Third structure - New Entity

To streamline the process further, at the end of each day, the changes from the simulation were mapped in a CSV file. This file was then placed on the SFTP server that updated the existing org chart or created a new one.

Key challenge

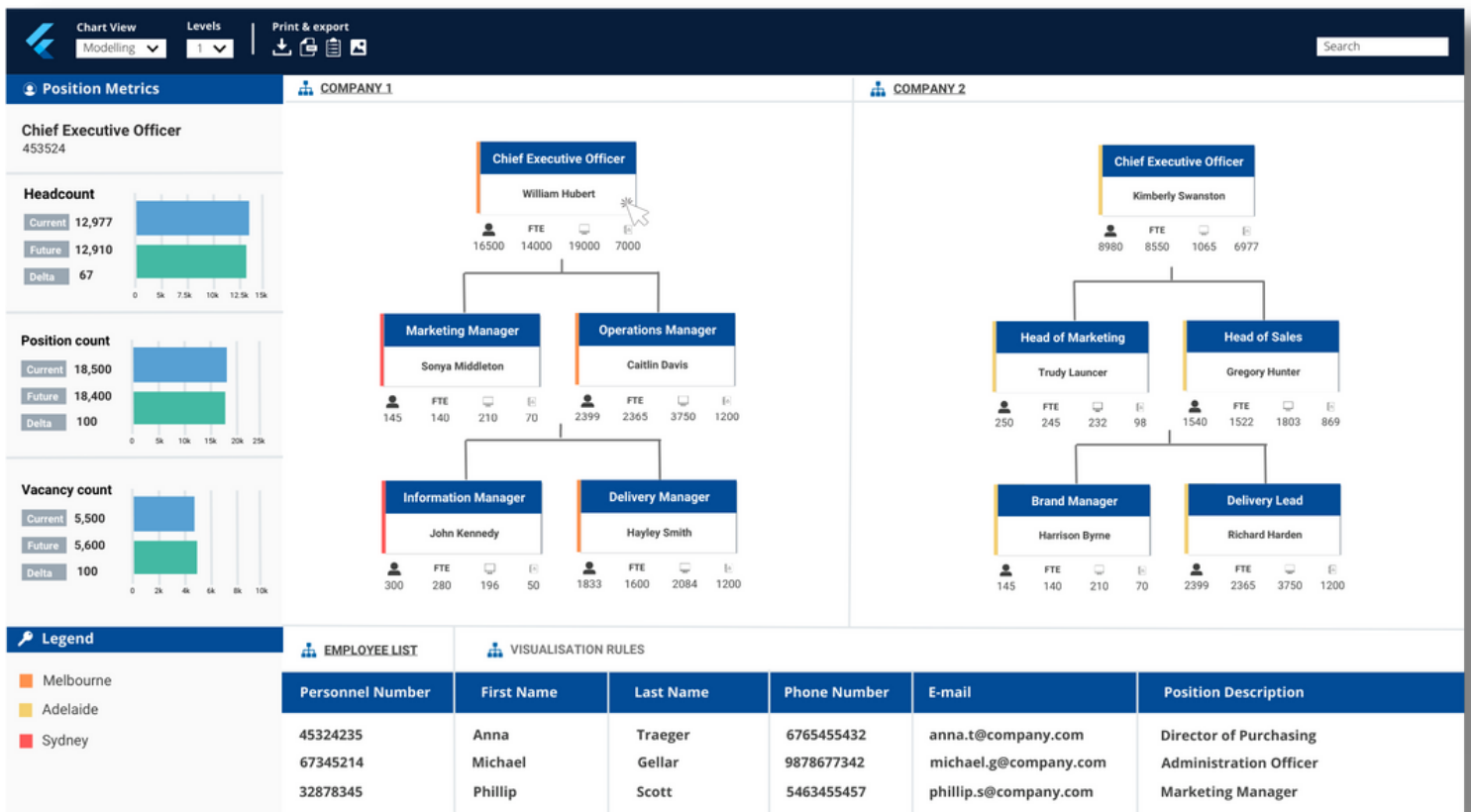
The primary challenge wasn't dealing with the process or data complexities but understanding the different stakeholders involved and their decision-making process. The Navigo team was successfully able to bring the stakeholders together by providing services to support the mapping, examination and visualisation of the merger and helped them make data-informed decisions using org.manager.

The solution

org.manager provided a comprehensive solution for visualising and managing the new position hierarchy. Key benefits for the team included:

- **Workforce modelling:** org.manager's workforce modelling capability enabled stakeholders to create multiple what-if scenarios and see the impact in real-time with a change summary report. A mapping table was created that defined their hierarchy (departments, positions, business units) to create the rolled up view of the merged company and create a usable export.
- **Drag-and-drop interface:** Workforce models were easily created and edited via drag-and-drop without affecting their source of truth data. To maintain data integrity, editing or creating new objects was able to be locked when needed.
- **Dashboard with FTE data:** The dashboard provided insights into the FTE data, this allowed stakeholders to monitor the workforce distribution across the newly merged entity.
- **Visual representation:** Visualisation rules and color codes were used to differentiate between the two original companies.

Below is an example illustrating the modelling capability in play for the merging of two companies:



Implementation

The configuration took approximately 35 hours and was primarily focused on setting up the data integration, backend processes, and initial visualisation. The project was implemented in 2 phases:

- Phase 1 - Getting a simplified view of the employee hierarchy.
- Phase 2 - Creating a new position structure with more functionality to add/edit positions.